

Strategy Guide for Pickleball

RAYMOND JAMES®

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Why Listen to Me?

My name is Owen Williams. I'm a 3.5+ pickleball enthusiast, and a member of the Victoria Pickleball Club in Langford.

I work at Raymond James in downtown Victoria at 1175 Douglas St. I spent 20 years working in institutional trading, where my job was to generate trading profits on proprietary accounts.

I managed risk effectively on \$1B+ of trades during the 2008 Great Financial Crisis, the flash crash in 2010, Trump 2016, and Covid 2020. I've seen traders and investors lose money in every way imaginable, and I'm using that experience to help investors in Victoria avoid mistakes and achieve the best financial outcomes possible.

When I started playing pickleball in 2022, I couldn't help but notice a good pickleball partner shares a lot of similarities with a good financial partner.

I've created this guide to help you play better pickleball, but I've also created this guide to show you how using the same types of strategies you use in pickleball can help you perform better financially.

Throughout the guide, we will play a hypothetical game with two different partners. We'll play one game with a great partner, 5.0 Frank, and another with a poor partner, No Fun Fred.

Sorry in advance to anyone named Fred!

As the game progresses, we'll see how 5.0 Frank makes pickleball more fun and more successful. Each section has a curated video link to help you improve your game in each situation.

Along the way we'll see how following the same principles as 5.0 Frank creates what I like to call the 5.0 advisor.

The financial partner that makes life more fun and more successful.



1 BEFORE THE GAME

We can't win a game of pickleball before it starts, but we can often tell a good partner right away.

A good partner introduces themselves, asks your name, and wishes you good luck.

No Fun Fred just wants to get the game going. He might nod, or worse, just launch a first serve right away. If he knows anything about your opponent, he's keeping it to himself. We don't know what type of shots Fred likes to hit, or the types of players he works well with.

You're just winging it with Fred!

5.0 Frank has a process. He's done this before.

He lets you know the player on the left is weak with volleys, and the player on the right doesn't dink well.

He lets you know he has a strong forehand and will take middle balls.

He asks you your favourite shot.

It's easier to play pickleball with people who foster a friendly environment.

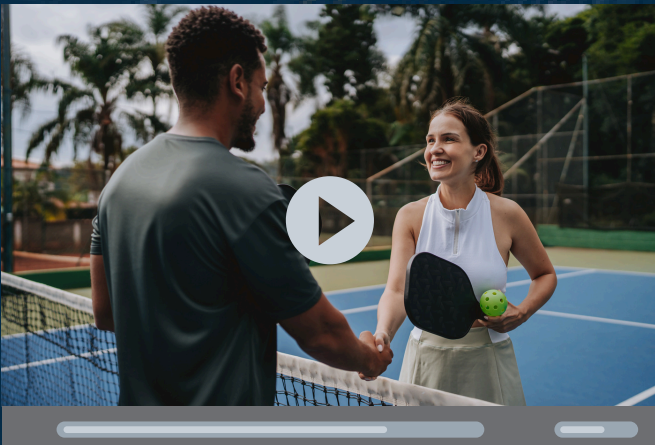
The 5.0 advisor has a process as well. They've done this before.

They let you know what to expect before any meeting.

They communicate clearly, without confusing jargon.

They ask the right questions and ensure they tailor their services to best suit you.

Investing is easier when you create an atmosphere of trust.



Pickleball Etiquette Rules for 2025



2 PROPER EQUIPMENT

We live in a world of infinite specialization.

You can get an inexpensive or expensive version of any product you can possibly imagine delivered to your house in 2 days. However, abundance of choice can lead to paralysis by analysis, and the result can be the emergence of the endowment bias.

People tend to attribute higher value to objects they already own, versus objects they do not own.

No Fun Fred embodies this idea perfectly. He's got a great pair of New Balance runners he bought in 2015.

They are in great shape, and he sees no reason to upgrade to court shoes. His shoes are comfortable, stylish, and, well, he already owns them!

Why would he pay \$100 for a new pair of Asics?

5.0 Frank knows specific products are best for specific use cases.

He's got a solid pair of K-Swiss court shoes in good repair. He has a mid-range paddle that suits his playstyle. He wears lensless protective glasses when on the court.

He won't rush out to buy every new gadget that comes along, but he's a pragmatist. If you've got a reasonable argument, he'll listen and decide for himself.

Frank's goal is to play pickleball for the long run, and he'll adjust his equipment as needed to give himself the best chance of reaching that goal.

The 5.0 advisor knows there are thousands of products and dozens of account types to choose from. Some are inexpensive, and some are incredibly expensive.

Some products suit one type of situation, and a completely different set of products suit another type of situation.

Do your products and your account types give you the best chance of reaching your financial goals? Or do you ascribe higher value to them because it's what you already own?

The 5.0 advisor is a pragmatist who objectively selects the right accounts and the right products to give you the best chance of success.



Why Court Shoes Matter

3 THE SERVE

How do you serve in pickleball?

The first shot of pickleball must be hit below the waist, with your serving arm moving forward in an upward arc when the ball is struck. The goal is often to just get the rally started.

No Fun Fred doesn't think much about how to serve, and the results are unpredictable.

On the pickleball rating scale, a 3.0 serve "lacks depth, direction, and consistency."

Have you ever played with someone who goes for too much? Half of the serves end up going out.

What about someone who consistently lacks depth? Short serves will provoke good players to step inside the baseline and make your 3rd shot extremely difficult.

5.0 Frank serves with power, accuracy, and depth. He can also vary the speed and spin of the serve.

Have you ever played with someone who consistently hits the back fifth of the court?

It creates weaker returns that give you an easier 3rd shot.

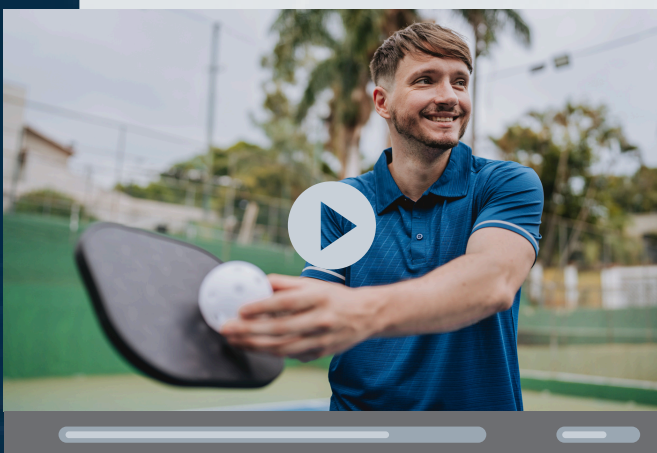
How about someone who has a tricky short serve they only bring out once in a while?

5.0 Frank has skill and experience. He's efficient. He's not going for too much, but he's also not giving up points being too safe.

On balance this results in winning more points.

The 5.0 advisor understands the balance between going for too much, and not investing for your future.

Efficient portfolios matched to your risk profile give you the best chance of reaching your financial goals.



Mastering the Serve



4 THE 3RD SHOT

The game is just underway. You've hit a deep serve, and your opponent has sent back their 2nd shot. It's heading towards your partner near the baseline.

What shot should they hit for your team's 3rd?

No Fun Fred has limited shots in his repertoire and doesn't always make the best decisions on when to use them.

He may know he has the option to drive or drop, but he might not know why he should choose either shot.

Maybe the ball lands very deep, and he goes for a drive, or the ball lands very short, and he pops up a 3rd shot drop to an opponent already at the net.

And heaven forbid the ball is heading to Fred's backhand!

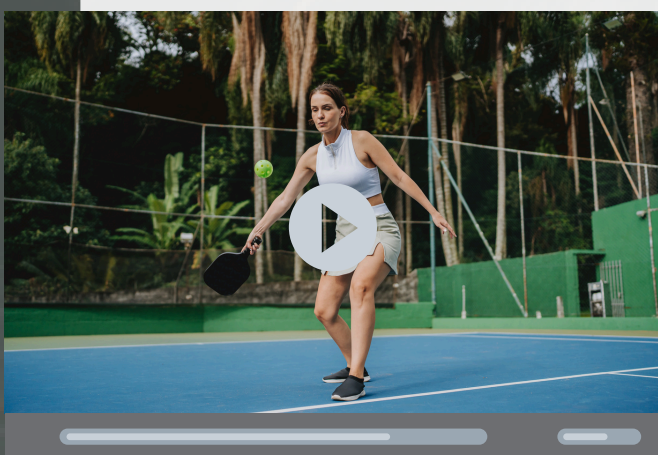
5.0 Frank is comfortable on his forehand or backhand, and he has a well-developed decision tree that tells him what shot to hit.

If the ball is short, he might spot the returning player hasn't made it to the kitchen line. He knows he can hit a drive to that person's feet. If the ball is deep, he not only knows how to hit a drop shot, but he can also accurately aim it either crosscourt or at his opponent's backhand.

The 5.0 advisor has access to the entire financial landscape, and they aren't obligated to sell just one company's funds or products.

The 5.0 advisor has working knowledge of all types of products in the marketplace and has a well-developed framework for identifying which ones are suitable for your specific situation.

Having access to all products equips your financial plan with the tools it needs for long-term success.



Drop vs Drive Strategy



5 THE 5TH SHOT

Your partner hits a poor 3rd shot. It happens to the best of us.

You can tell right away the ball is going to be coming back at you, hard.

How do you react?

No Fun Fred isn't ready.

He doesn't communicate the poor shot, and he doesn't get low and wide to play defense.

Sometimes he'll get his paddle down, but if the ball comes back hard, he's already turning to walk back to the baseline.

5.0 Frank knows the point isn't over.

Immediately after giving you a verbal cue to make sure you know the shot is high, he's got two hands on his paddle, his stance is wide and balanced, and he's looking to lift the ball back over the net.

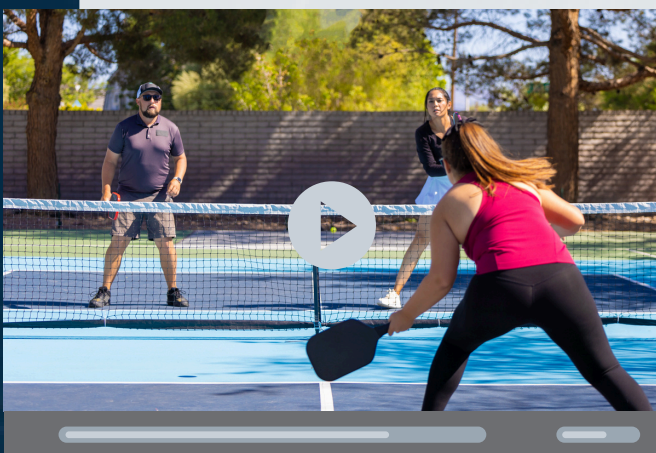
It might take a 7th or 9th shot to be able to move back to the kitchen line, but what a rush it is when you win a point you thought you were totally out of!

In financial markets, there are always setbacks. Stocks go down, bonds go down, and people get scared.

The 5.0 advisor regularly communicates with you, helping you stick to the plan.

Some people prefer frequent communication, and some prefer less frequent. The key is making sure everyone is aware and comfortable with the situation. Selling your assets when things get tough is the same thing as walking away from a point you can still win.

Staying diversified with proper asset allocation improves your chances of winning in the long run.



How to Play Better Defense



6

THE DINK RALLY

Things are going well with you and 5.0 Frank. The serve is in, and although the 3rd shot drop didn't go well, you played defense together and made it back to the kitchen line.

Now what? You're in a dink rally.

It's a test of strategy, patience and skill.

You want to force your opponent into weak shots, or better yet, a pop up. On the other hand, you don't want to go for too much and lose the point with an unforced error.

Have you ever played with a banger who always speeds up shots that are too low? How about someone who sags off the kitchen line and isn't in position?

You work so hard to get up to the kitchen line, and No Fun Fred is standing 2 feet back from the kitchen. He's not covering the middle, and it gives your opponent an easy opportunity to split the two of you.

Not only that, but Fred is also speeding the ball up at the wrong times. Sometimes his speed-ups land in or jam up your opponent, but more often than not they either sail long or go into the net.

5.0 Frank positions himself to best support his partner.

The ball goes wide left, and he covers the middle so you can cover the line. The ball floats up and he's right on the kitchen line for the put-away. The ball is low and he hits solid dinks to multiple locations to keep you in the point.

A lot of the time, it's Frank's shots that set you up for the winner!

The 5.0 advisor moves with you over time as you progress through the natural investment life cycle. They support you through the stages of growth, preservation, and distribution.

A skillfully constructed financial plan considers risk, taxes, family, and estate planning to ensure you are in the right investments at the right time.



[5 Dinking Mistakes to Avoid](#)

7

KNOW THE SCORE

You and your partner are doing great together. You are friendly with each other, tapping paddles after points you win and points you lose. You are selecting good shots, and you are ahead in the game.

However, you notice your partner has a funny quirk. They never know the score!

We all know common etiquette is to call out the score in the same format every time before the serve. Your number of points, the opponent's number of points, and whether it is serve 1 or 2.

10-4-2!

No Fun Fred never says the score before he serves.

You aren't sure if he doesn't know the score or if he just doesn't believe in following the conventional etiquette.

Regardless, it's making you a bit uncomfortable. You probably start saying the score for him so your opponents are aware.

5.0 Frank knows the score, and always clearly calls it before each point he serves.

It's just common courtesy!

The 5.0 advisor always knows the score, and regularly communicates so you know it too.

Unexpected events happen in life. The 5.0 advisor maintains a strong relationship so they can adjust the plan as these events occur.

Even if no such events pop up, they meet with you at least annually to go over the plan and keep you informed.

Depending on your circumstances it might be important to keep other trusted persons aware of the score too, such as children or a power of attorney.



Pickleball Scoring: Best Practices



8 THE LEFT-HANDER

You notice another interesting attribute of your partner. They're a lefty!

You had thought something seemed a bit different but couldn't put your finger on it. This is definitely something to address! For anyone who has played with a lefty as a right-handed person, you know it can get a little confusing when you have two forehands in the middle.

No Fun Fred is a 3.0, and he's never heard of stacking. You aren't experienced enough to teach him, unfortunately. Sometimes he takes middle balls when he's on the right side, and sometimes he doesn't because he expected you to get it.

Your opponents figure it out and are constantly sending you middle dinks. One time you both go for a high ball, and he smacks your paddle completely out of your hand!

5.0 Frank addresses his unique attribute right away.

He offers up immediate tips on stacking to see if it's something you want to try. He also sets out clear rules on how your strategy is different playing with two forehands in the middle.

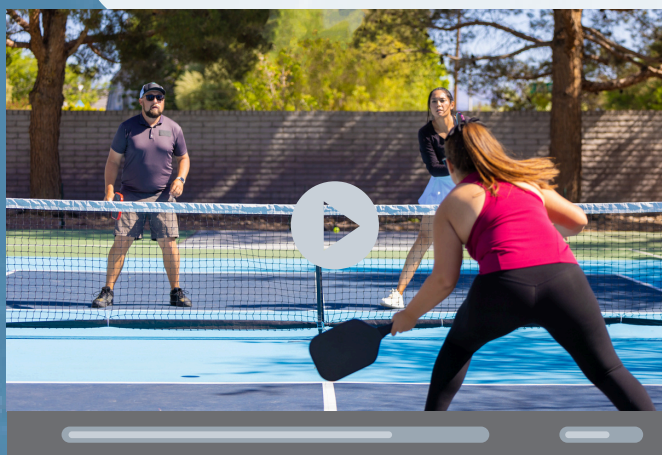
Now if you're on the left side and the ball goes out wide left, you are only covering the line because you know Frank has the middle with his forehand. After a few points you are hitting the shake and bake for easy points!

The 5.0 advisor does their due diligence before play starts.

They get to know the entire you: current situation, areas of concern, challenges, goals, vision.

Do you have specific environmental concerns? Governmental concerns? Social concerns?

The 5.0 advisor gets to know the real you, and your unique characteristics. Concerns are mitigated by a specialized strategy.



Strategies for Playing With Lefties





Case Study

Clarity Through Coordination

SUCCESSFUL SAVERS TO STRATEGIC RETIREES

Frank and Eileen are affluent retirees who love travel and time with friends. Over the years, multiple advisors and “country-club” ideas left them with a dozen scattered accounts.

They pay a high marginal tax rate and were surprised to learn their estate could face a large tax bill and long settlement delays.

How can they lower taxes and simplify life without giving up their lifestyle?

Implement a step-by-step plan



**Strategy without
tactics is the slowest
route to victory.
Tactics without
strategy are the noise
before defeat.**

— Sun Tzu, “The Art of War”

DO-IT-YOURSELF

Want the one-page “Retiree Account Consolidation Checklist” and the “Withdrawal Sequencing Worksheet”?

Send me an email and I’ll send both.

owen.williams@raymondjames.ca

Step 1: Get clarity

- Consolidate statements and list all accounts, ownerships, beneficiaries, fees, and estimated income.
- Diagnose overlap: actual asset mix, duplicate holdings, and idle cash.
- Outcome: one master-view for decisions.

Step 2: Define the retirement paycheque

- Calculate what it truly costs to live well.
- Fund that amount reliably; optimize the rest for tax efficiency and legacy.



Case Study Continued...

SUCCESSFUL SAVERS TO STRATEGIC RETIREES

Step 3: Coordinate the team

- Align the advisor, accountant, and lawyer, so the withdrawal plan, corporation strategy, and estate documents tell the same story.

Step 4: Tax-smart withdrawals

- Sequence non-registered, RRSP/RRIF, and TFSA draws to target a tax “sweet spot.”
- Manage CPP/OAS timing to reduce clawback.
- Preserve TFSA capacity for tax-free growth and probate avoidance.

Step 5: Reconfigure income type

- Interest is punished in personal and corporate accounts.
- Where suitable, shift toward structures that aim to deliver more capital gains/eligible dividends instead of interest. Review corporate-class funds and other tax-aware options with your accountant.

Step 6: Estate liquidity and speed

- Executors often wait months for non-registered accounts to settle through the estate.
- Maintain a “liquidity sleeve” that can bypass probate and pay directly to beneficiaries when appropriate. Understand fees, guarantees, and beneficiary designations.

Step 7: Charitable and family giving

- Use in-kind donations of appreciated securities to eliminate capital gains tax on the gift and increase impact.
- Match beneficiary needs to payout methods (lump sum, trust, or staged payments).

Frank and Eileen worked hard for their freedom. By organizing what they own, choosing how income shows up, and planning for what happens next, they can enjoy more today, while knowing their estate will be settled with care and clarity.

9 STACKING

What if you have a good forehand, but a very weak backhand?

How can you work with your partner to have the most fun and the greatest chance of winning the match? Hide weaknesses and highlight strengths with stacking.

No Fun Fred plays the same strategy regardless of who he's playing with.

Great forehand, weak forehand, fast hands, slow hands, tall, short, young, old. He does his thing and doesn't adapt. You've now learned about stacking, and suggest it to him. You need to play the right side because you are being targeted on your backhand, but he's not interested.

5.0 Frank knows stacking is quite simply planning in advance which side of the court you will play the point from.

Players with a strong forehand typically play the left side, and they take the majority of balls. Players with a weaker backhand typically play the right side. The right side player will mostly be hitting with their stronger forehand on balls wide right, and their weaker backhand will be covered by the left side player's strong forehand.

The result is highlighting the strongest forehand on the team, and reducing the chance of targeting the weaker player.

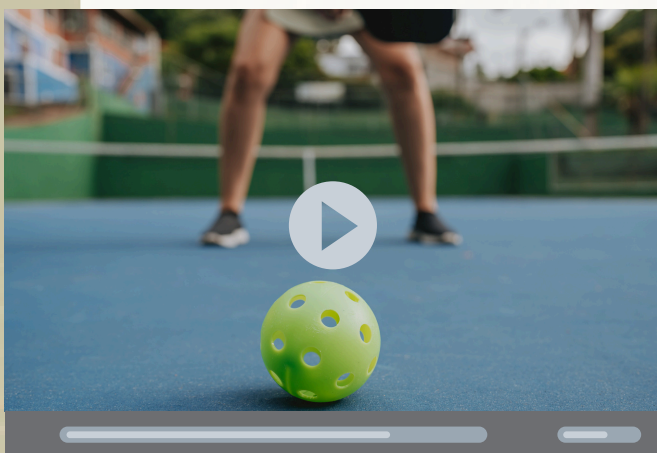
5.0 Frank adjusts his strategy and protects your weaker backhand.

He anticipates balls coming to your side, and uses his strong forehand to swat balls and win points.

The 5.0 advisor adjusts strategy to meet your specific constraints.

What if half of your net worth is in one company? What if your employment is based on the cyclical nature of a specific resource sector? What if you receive an inheritance that is a single commercial property with 1 tenant?

These are not one-size-fits-all situations. Having strengths and weaknesses is normal.



The 5.0 advisor helps you lean into strengths, mitigate weaknesses, and design a custom strategy that gives you the best risk-reward trade-off.

What is Stacking?



10 THE RESET

Let's go back a few steps and remove all the unique attributes of you and your partner. It's back to a regular game of two right-handed players having a recreational game.

Your team is making it back to the kitchen line effectively when serving. You are getting into dink rallies, but you are off today and are popping the ball up regularly.

What do you and your partner do?

No Fun Fred stands right on the kitchen line. Maybe he doesn't even realize the ball is going to come at him hard. Or maybe he sees the opponent dip their paddle for a speed up, but he's planning to hit the ball hard as well.

Fred is planning to fight fire with fire.

You have taken a step back from the kitchen line, and you see how this is going to play out. No Fun Fred either gets body bagged or sails his return volley into the back fence. He doesn't know how to slow down and play a reset.

5.0 Frank knows when you lose control of the point, you don't grip it and rip it.

When Frank sees the pop up, he immediately takes a step back and gets into a ready position.

He has his paddle waist high with a loose grip. He's looking to take power off the speed up and drop the ball softly in the kitchen. Now is not the time for big swings!

The 5.0 advisor has experience in all market conditions.

Sometimes volatility is low and it's easy to be a winner, but sometimes volatility is high, and you need to weather the storm. Taking big swings with your portfolio when the market is volatile is extremely risky.

Sure, you might get lucky and time things right, but more often you are body bagging your financial future.

The 5.0 advisor takes compact swings. A little dollar cost averaging here. A little tactical asset allocation there.

Weathering the storm and staying in the game is always the smart choice.



Mastering the Reset



11 VOLLEYS

In the last example you were faced with the tough situation of having to play the reset. You succeeded and now you're feeling full of confidence.

Your opponent isn't being as aggressive because your defense is so solid. They are now the ones giving you pop ups.

Is it your time to go on a run?

No Fun Fred sure thinks so. He's taking full swings at every ball that's slightly above the net.

His emphatic smashes look great when they go in, but half the time he's hitting it into the net or hitting it well out. What went from a game you should win easily has turned into a close match. These are easy balls Fred, you need to capitalize!

5.0 Frank has compact and consistent volleys.

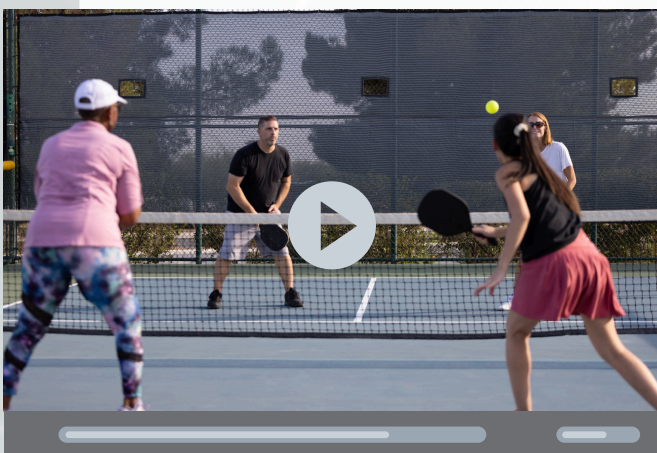
Frank knows pickleball isn't a game of spectacular winners. It's a game of percentages and angles. He doesn't need to keep taking big swings when he has the advantage in a point. His quick punch and roll volleys get the job done and don't let his opponent back into a match by taking too much risk when he's ahead.

The 5.0 advisor reduces risk in a portfolio if markets go your way.

Sometimes we just get lucky, and we save and invest over periods of fantastic returns. Financial goals are met early, and we have the opportunity to take less risk.

If you meet your goals early, should you risk going backwards and falling short in retirement? Or would it be a better idea to reduce risk, take smaller swings, and narrow that range of outcomes?

When the markets give you a big lead, a 5.0 advisor takes the opportunity to reassess risk to ensure you reach your goals.



3 Tips for Strong Volleys

12

PLAYING WITH INTENTION

You're into the second hour of your scheduled court time, and you've seen every shot from your opponent. You've had dink rallies and volley rallies. You've seen their forehand drives and their backhand drives. You've seen drops and lobs.

Having seen everything your opponent has to offer, how do you decide where to place your shots?

No Fun Fred doesn't think about where he returns the serve or where he hits his 3rd.

His only goal is to get the ball over and in. Maybe he's aiming for a deep serve return, but he keeps hitting it to an opponent's strong forehand drive. On his 3rd, he's consistently driving for the middle, even though the opponents have strong volleys.

5.0 Frank plays with intention.

He observes one of his opponents has a weak backhand drive, so any service return he can, he goes up the line, forcing his opponent to hit a backhand.

He sees the opponents' strong volleys when driving, so he switches to mostly drops. He neutralizes the advantage, and both of you are getting up to the next more and more often. He might not make every shot perfectly, but he has a plan for where to hit the ball and why. The result is winning more games by playing high percentage shots.

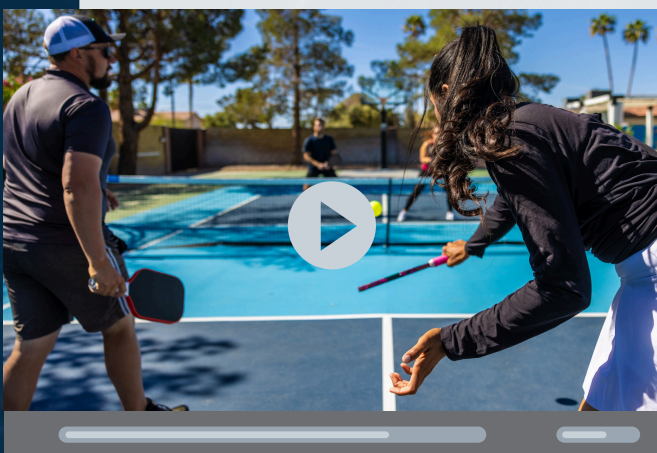
The 5.0 advisor has experience with what the financial markets have to offer and is intentional with every move.

They maximize retirement income by using optimal account types, withdrawal strategies, and tax minimization strategies.

They maximize growth given your risk tolerance by using high-quality, low-cost investment vehicles.

They lower stress and provide the comfort of knowing that every dollar is intentionally organized in a way that gives you the best chance of reaching your financial goals.

When you play with intention, on the court and with your finances, you play high percentage shots that give you the best chance of winning.



Hitting With a Purpose



13 THE MISMATCH

Most people in pickleball have decided on a skill rating for themselves. They'll either use their DUPR score, or a rounded number they use to find appropriate competition. 3.0, 3.5+ 4.0, 5.0 etc.

If two players who identify as 3.0's play a match against two players who identify as 5.0's, the score will not be close! It probably won't be very fun, either. How do you conduct yourself when the game is a mismatch?

No Fun Fred doesn't recognize the situation. He'll lob an older player with reduced mobility.

He'll speed it up into the body of a player who clearly prefers to play a soft game.

He'll continually target an opponent's weak side to win easy points.

No Fun Fred uses the shots he knows to win easy games against weaker opponents.

5.0 Frank recognizes when he has an advantage and takes the opportunity to improve his game.

If a weaker player prefers to play a soft game, he'll work on his new two-handed backhand top-spin dink.

If a player has reduced mobility, he'll feed them dead dinks to increase the challenge.

He'll hit to the opponent's strong side and practice the ATP (around the post) on wide dinks.

5.0 Frank knows he has nothing to gain from winning a game 11-0 against a weaker opponent.

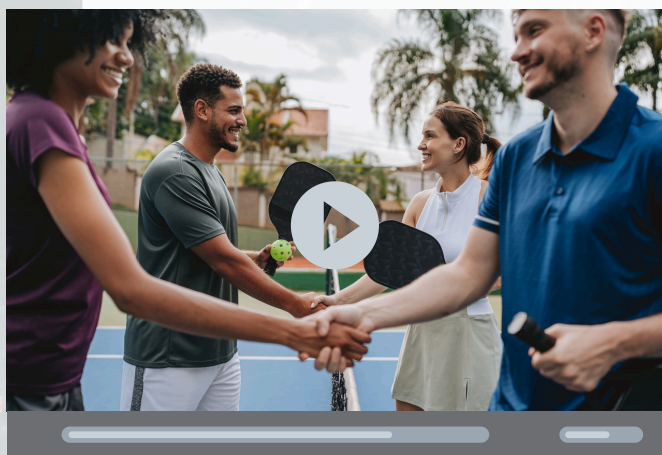
The 5.0 advisor knows there is always room for improvement too.

The truth is: It doesn't matter what position you find yourself in right now. What matters is whether you improve your position today.

Every ordinary moment is an opportunity to make the future easier or harder. The game of pickleball, and the game of life, is always evolving. The strategies and tactics that got you to where you are now won't work forever.

There are always new rules, new constraints, new preferences and new realities.

The 5.0 advisor knows the key to success in the long run is to continually review, refine and adapt to change.



Never Do These Things in Pickleball

14 BETWEEN MATCHES

It's been a fun two hours at your favourite pickleball court. You've gotten exercise, shared a few laughs, and hit a few Instagram-worthy shots. You're ready to head home, and you look forward to playing again soon.

You want to make sure you can play pickleball for years to come, so what can you do to help yourself in between matches?

No Fun Fred shows up 5 minutes before the game and is ready to play.

He doesn't need a warmup, and he's definitely not doing any mobility at home. He's got a nagging hip injury, but once he's in the game it doesn't bother him too much. He's taking his chances, and it might never be a problem, but he could be doing so much more!

5.0 Frank knows if he wants to keep playing pickleball for years to come, it's in his best interest to take care of his body.

3 times a week he prioritizes mobility drills at home, and he is comfortable spending money on his health by going to a trained physiotherapist regularly. He's had a few injuries over his life, and he's learned it's so much better to address nagging pains early versus risking a full-blown injury. Nobody wants to lose 3 months of fun because of something preventable.

The 5.0 Advisor takes care of their body, mind and business.

They continue their education and pursue professional designations. They attend seminars, webinars and conferences that enhance their ability to serve clients.

They operate their business underneath the stable, long-term reputability of established investment firms.

They are in it for the long run, and they prioritize organizing their life to be the best advisor they can be.



Mobility Exercises to Improve Your Game



15 SLEEP

According to Statistics Canada's 2020 Canadian Community Health Survey, only 54% of Canadians aged 65-79 slept 7-8 hours a night, and half of the respondents reported trouble going to sleep or staying asleep most or all of the time.

You've probably heard it time and time again that a good night's sleep is incredibly important. You've also heard there are countless tips and tricks on how to get better sleep.

Common strategies are to limit caffeine after 3pm, not eating 2 hours before bed, avoiding alcohol, and getting regular exercise.

But even if you do all of those things, there is that special place in your brain that lights up the second your head hits the pillow.

It's the racing mind fueled by stress and anxiety.

No Fun Fred looks tired after the game, and he admits he hasn't been sleeping well. He knows there are strategies he could implement to help improve his sleep, but he keeps putting it off. He'll get around to it soon, he's just busy right these days. Once all that calms down he'll look more into what he can do to sleep better.

5.0 Frank knows all the basics, and lives by them.

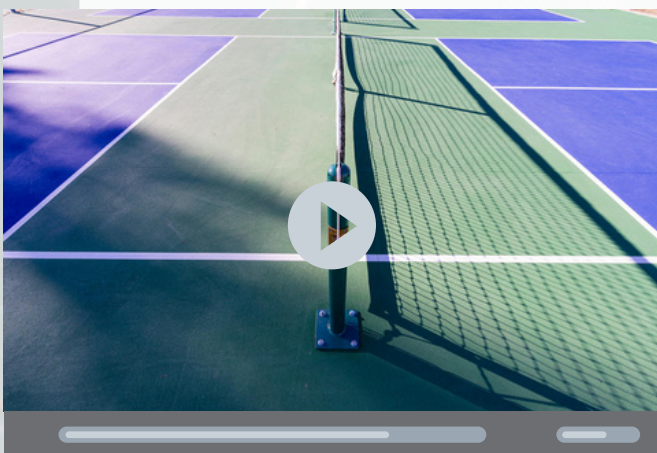
He never has coffee past 3pm, and most nights he won't eat past 8pm. He wears a fitness tracker and he tries to keep his bedtime routine consistent.

His plan might not always work perfectly, but he sticks to it and he's regularly getting 8 hours.

The 5.0 advisor helps you sleep better by reducing money stress.

They've taken the time not only to get to know you, but to get to know your 'why'. They've tied your 'why' to your financial plan, and the result is a better night's sleep.

Whenever your mind starts to worry about money, you know you have immediate access to the advisor, and the advisor is backstopped by the plan you both created together.



Is Poor Sleep Sabotaging Your Game?

Putting It All Together

PLAYING TO WIN IN THE LONG RUN

Thank you for taking the time to read through my pickleball strategy guide.

I hope you've learned a thing or two!

They say that when you start pickleball you are playing a game of checkers, but when you become more skilled you are playing a game of chess.

At the higher levels the game becomes positional and full of angles. Those who win play with finesse in addition to power.

Pickleball is never a game of hitting winners.

Those who go for too much on any given shot will always end up losing to players who consistently play high percentage shots.

”

By playing pickleball, you've made the decision to say yes to fun, fitness and friendships.



By choosing me as your 5.0 advisor, you've made the decision to say yes to a financial partner who supports you on and off the court.

SMART PICKLEBALL. SMART FINANCES.

You can see how this type of thinking translates to financial planning.

I work with pickleball players who refuse to settle for advisors who are poor partners.

I work with people who appreciate the value of playing chess, not checkers. People who want a partner that takes the time to listen, has a wide range of skills, and implements high percentage strategies.

Let's get together and ensure you're on the right financial path so you can keep playing pickleball far into the future.



P.S.

As a fellow pickleball player, I can offer you a special introductory meeting opportunity.

A 5.0 introduction meeting is a high-level discussion of what is on your mind, and what your current situation looks like.

It's not an interrogation. You aren't obligated to bring a bunch of paperwork and have your accounts scrutinized.

INDEPENDENT ADVICE

My goal is to show you how a service-first advisor is your independent guide to solving the challenges you face.

We'll plan for 20 minutes, but you are free to go early or welcome to stay late.

We'll collaboratively discuss what types of approaches might provide solutions to what's on your mind.

At the end of the meeting, no commitment is needed or accepted.



CONTACT INFORMATION

[BOOK AN APPOINTMENT HERE](#)



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Advisor's Opinion

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